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The objective of this study was to provide the background necessary for a statewide system of interlibrary cooperation to be developed in a Phase II study. Interviews were held with nearly 70 individuals throughout the state and research was conducted to gather data on Oregon in general, on Oregon libraries, and on examples of interlibrary cooperation in other states. The report discusses (1) library cooperation versus library development; (2) library needs of education, local government, and business and industry; (3) problems and prospects of meeting these needs; and (4) activities planned for the Phase II study. It is recommended that these activities include investigation of (1) regional systems, (2) cooperative mechanical functions, (3) user needs, (4) available resources, (5) mechanics of a finished system, (6) data processing applications, and (7) economic feasibility. (JW)

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STATE OF OREGON
PLAN FOR INTERLIBRARY COOPERATION

PHASE I STUDY

LI 001648

FRY CONSULTANTS INCORPORATED
MANAGEMENT COUNSEL

March 1, 1968

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
OFFICE OF EDUCATION

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March 1, 1968

Board of Trustees
Oregon State Library
State of Oregon
Salem, Oregon

Gentlemen:

We are pleased to present our final report on Phase I of the Plan for Interlibrary Cooperation in Oregon. This report encompasses several significant changes from our "Draft for Discussion Purposes" submitted in August.

That report, issued to both the Advisory Council and the Trustees, evoked considerable discussion. It produced a significant contribution in that it established a specific point of departure for discussion. Whereas during the course of the interviewing for Phase I, we sometimes found it difficult to obtain critical commentary, the Draft report produced a tangible basis from which argument could proceed.

The most obvious conclusion from our earlier meeting is that the definition of cooperation is still perceived in many ways, and that another term "development" is frequently interwoven. As a result of additional meetings, we present a short discussion in this final report which we hope better defines the terms, and is an agreeable basis for progress.

Secondly, some clarification is introduced in the section on methodology as a result of additional meetings held in the State.

We want to thank the Trustees, the State Librarian and her staff, the members of the Advisory Council, and the many respondents in this study whose attitude and cooperation made it possible, not only for Phase II, but for the ultimate cooperative activity which lies ahead.

Sincerely,

Fry Consultants

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I. INTRODUCTION

The Oregon State Library Board of Trustees, acting on the recommendation of the Advisory Council for Title III of the Library Services and Construction Act, retained Fry Consultants Incorporated, a general management consulting firm, to conduct a Phase I study of interlibrary cooperation in the State of Oregon directed at determining the problems and objectives of a Statewide system of interlibrary cooperation.

The Phase I study was not designed to produce a system of cooperation. Its objective was to provide the background necessary to properly structure a Phase II study ultimately resulting in a Statewide system of interlibrary cooperation which would provide better library service to the people of Oregon.

Scope of the Study

In order to accomplish the objective of the Phase I study, the following goals were established:

-- To determine the desirability of the concept of interlibrary cooperation in the Oregon situation and to place parameters upon the expected value to be received from such a plan of cooperation.

-- To develop a mechanism for accurately evaluating the existing resources available to some form of coordinated library service. Similarly, to develop the mechanism for evaluating the expected needs of the State so that the resources may be compared to the needs.

-- To conduct the study so, at its completion, a clearly defined course of action is apparent for the conduct of Phase II, including an estimate of expected costs and necessary time to complete Phase II.

-- To develop an effective approach to dealing with three major subsections of the finished study

  - the problems of mechanics of the finished system
  - the problems of fiscal responsibility for a newly developed approach to library service
  - the requirements of a step-by-step action plan which will enable implementation of the finished study.

Methods

The purpose and scope of the study were discussed with members of the Title III Advisory Council at a meeting in Salem. During the meeting, the following approach to the conduct of the study was presented and agreed upon.

Interviews

In an effort to obtain opinions on library problems and the possible benefits and shortcomings of a system of interlibrary cooperation, interviews were held with nearly 70 individuals throughout the State representing libraries, elementary and secondary schools, colleges and universities, and State and local government.

In addition, discussions were held with officials of the American Library Association and the United States Department of Health, Education and Welfare.

Recognizing that interlibrary cooperation involves a variety of economic, political, and social forces in the State, the interviews dealt with the subjects of governmental cooperation, fiscal affairs, legislative activity, education, and general library problems, as well as the basic theme of interlibrary cooperation.

Research

Materials pertaining to libraries in the State of Oregon and in other states, particularly those with existing systems of interlibrary cooperation, were studied and related to the objectives of the Phase I study.

Data on the fiscal, governmental, demographic, and educational characteristics of Oregon was also reviewed and related to the problem of interlibrary cooperation in the State of Oregon.

II. FINDINGS AND CONCLUSIONS

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Defining Interlibrary Cooperation

The term "interlibrary cooperation" is applied to a number of different library situations and systems. Libraries in Oregon have exchanged materials on an informal basis for many years and several such as the Medford Public Library, the Josephine County Library, and the Ashland Public Library have joint processing and limited joint acquisiton arrangements. However, a Statewide system of interlibrary cooperation in Oregon must be defined in broader and more formalized terms to include all of the facilities, materials, personnel, and technical services in all of the libraries in the State.[1]

In short, all of the library resources of the State should be utilized to the maximum extent possible to meet the library needs of the people of Oregon.

It is apparent from the discussions which have been held with various respondents during this study that some problems of definition arise with the terms "cooperation" and "development." It may be useful here to indicate how we view these two activities, and to indicate how and where we feel they overlap, and where they are separate.

We feel that both cooperation and development are undertaken for the same ultimate objective -- improved library service for the library patron. To that extent, we consider it inappropriate to try to completely separate the two. This is not a study which excludes development requirements, nor in our view would a practical study of development exclude the potentials of cooperation.

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[1]Ideally, all libraries should be included in a cooperative system. However, the inherent problems involved in working with publicly and privately financed institutions must be recognized.

Oregon today has resources -- library books, buildings, people, money. By any accepted standard, it has too few of each of the resources. In attempting to improve the service to the people of the State, ideally perhaps the goal would be to develop facilities, collections and human resources to an acceptable standard throughout the State. But this is unrealistic in Oregon today. The task is too large, and the available or prospective funds too small.

Enter here the opportunity for cooperation. Given the existing resources, our unreserved conclusion is that cooperation offers opportunities for better utilization of those resources, thus providing improvement in service levels.

We do not expect that cooperation will allow Oregon to achieve utopian levels of service. We do feel that when cooperation is implemented, the task of development becomes attainable.

To some degree, cooperation and development in Oregon has assumed a chicken versus the egg debate. We feel that expressing the argument in terms of a continuum has validity.

Oregon today has service levels at point "x" on the scale below.

x_____ y _____z

Today - inadequate	After cooperation, substantial improvement, but below optimum	Cooperation plus Development

By the vote of all concerned, today's levels are inadequate.

Point "z" represents optimum, which may be expressed in terms of standards -- ALA, OLA, or some newly devised set of standards. Point "z" might certainly be attained solely through development, if the financial resources were available. In Oregon, they are not.

Consequently, cooperation -- better utilization of <u>today's</u> resources -- can move us significantly along the continuum with relatively modest investment. Although it does not reach optimum, it closes the gap.

At this point, we feel development can become meaningful and attainable. The cooperative activity should produce several results

-- it by itself improves service levels to the population

-- it maximizes existing resources

-- by doing so, it lessens the burden on development requirements

-- <u>it will likely shift the development requirements</u>.

It is for the last reason that we feel cooperation precedes development in the Oregon situation. We would expect Phase II to provide a clear-cut role for development, and to establish the standards and requirements by which development would ultimately close the gap.

<u>Library Needs in Oregon</u>

If a system of interlibrary cooperation is going to meet the library needs of the people of Oregon, it is obvious that these needs must be clearly defined. Unfortunately, there is no information available that describes and quantifies these needs. Various studies have compared the resources of

existing libraries to standards developed by the American Library Association, the Oregon Library Association, and the Department of Education. These comparisons, which relate existing libraries with arbitrarily established standards, show Oregon libraries to be significantly below those in many other states. This approach has value, although it places its entire merit upon acceptance of a definition of need as "matching standards."

It is more significant in our view, however, that clearly defined patterns of usage and, therefore, needs, have never been established either in Oregon or anywhere in the country. There is no reliable information relating to who uses libraries (except in the broadest sense, i.e., students) or more importantly, why they use them. There is ample visual evidence that high school students place significant physical strain on public libraries -- but there is also some evidence that the usage of the public library is as a "study hall" which is parentally acceptable for evening gathering. Similarly, no data exists on frequency of requests or loans for various categories of books -- or of requests made of reference librarians. In short, needs of libraries are expressed as the requirements for improvements as perceived by librarians.

In our view, pioneering work needs to be undertaken in this area, and the Phase II study for Oregon must incorporate detailed work in this area.

Our recommendations regarding the methodology of determining Oregon's library needs will be outlined in a later section of this report.

While there is no clear measure of the library needs of the State, the field interviews for this study did uncover the following specific areas in which respondents repeatedly emphasized a lack of adequate library service.

Education

The growth of student bodies coupled with broader and more complex curriculums in schools at all levels in the State have put a tremendous burden on school facilities. The student bodies of Southern Oregon College and other State colleges have increased many times over in the last ten years, while growth of their library resources has been at a relative standstill.

The development of the Community College program has created a whole new area of library demands in the State. Unfortunately, funds have not been available for the development of adequate libraries. Lane Community College has relied heavily on the library resources of the University of Oregon and the Community College in Roseburg has had to exist with a library collection that is no larger than the private collections of some University professors!

Secondary and elementary school libraries have been developing at a steady rate with the help of federal programs. However, the funds are inadequate and whereas libraries such as Roosevelt High School in Portland have tremendous resources; other libraries, particularly in rural areas, are either nonexistent or so inadequate that they are virtually without value.

According to the Chancellor's office of the State System of Higher Education, adult education programs have been handicapped or not started at all simply because adequate library resources are not available.

Often when school library facilities are inadequate to meet the demand of the students the public library in the area, if there is one, cannot absorb the student load.

It should be pointed out that although there is a need for improved library resources in the schools of Oregon, the academic libraries are, in many cases, the major library resources of the State. Certainly the University of Oregon Library, ranked as one of the largest academic libraries in the country, is a major asset in the State. Also, the school library is the only library resource in many areas, the physical facilities of libraries, such as at Central Oregon College, are the best in the region. These facts are important since a system of interlibrary cooperation will attempt to make maximum use of all of the resources of all of the libraries in the State.

The library problems of higher education are unique and of a different order than the general library problems of the State. While a Phase II study must direct itself to all libraries, particular attention must be given to the cooperative system for higher education that is self-contained, yet adaptable to the needs of the Statewide cooperative plan.

Business and Industry

Oregon's economy is becoming quite diversified and economic planners and businessmen in the State who were contacted during the study stressed the importance of having good library resources to attract and service business in Oregon. Library resources directed at business and industry are centered in the greater Portland area, in Salem, and in Eugene. While it is true that business is also concentrated in these areas, there appear to be even fewer means for servicing and interchanging the business needs and resources than in either the public or academic areas. Lastly, some of the available private resources of business seem to be totally separate from any other system of library exchange. It will be important in Phase II to coordinate closely with studies being conducted under the State Technical Services Act aimed at providing better library service to business and industry in Oregon.

Local Government

Administrative officials in City and County government are beginning to demand library resources that will help them in dealing with the complex problems of urbanization. One official interviewed in Salem reported that he used library resources nearly every day. He was fortunate in that he was close to a major library -- the State Library. Many officials are not as fortunate and are not even aware that they can get materials from the State Library by going through the local public library.

Library service to local government should also be an important consideration in Phase II, not only because it is an area of expressed need, but also because it provides an opportunity to make government officials increasingly aware of the problems and benefits of library service, which may prove valuable in enlisting community support for a cooperative system.

The three areas discussed above, Education, Business and Industry, and Local Government, present clear evidence that there is a need for better library service in Oregon even though it is not possible to define the dimensions of the need.

Meeting the Needs

Phase II of this study must conduct much more exhaustive research into the area of needs. Ultimately, the needs can only be properly met when they are better understood. Still, some parameters for meeting the needs emerged from Phase I.

Can Existing Libraries be Upgraded to Meet the Need?

Simply stated, it is presently impossible for most libraries to serve all of the needs of their constituents. Economic resources preclude a library in Ontario, for instance, from becoming a complete community recreational center, an educational facility, and a reference and research institution. In a number of Oregon counties, even if all of the tax revenues were used for public library development, the resulting library would be inadequate at best.

The same situation applies to academic libraries. The librarian at a State college who was interviewed felt that the resources of his library would have to be 20 times as great as they are to completely service the needs of the faculty and student body. Obviously, his wish is beyond the financial capabilities of the State system of higher education; particularly since other colleges would probably make the same demand. Even if adequate funds were available to develop outstanding libraries in every area, it is questionable whether this would be the most efficient use of the money considering the unnecessary duplication that would result.

Can a System of Statewide Interlibrary Cooperation Meet the Library Needs of Oregon?

A system of interlibrary cooperation would broaden the service capabilities of every library in the State by:

1. Making available all of the library resources of the State to every library in the State, while allowing each library to maintain its operating autonomy.

2. Presenting opportunities for eventual reduction of unnecessary duplicate resources.

3. Better utilizing local resources so as to allow expanded service to the broad demands of a community.

4. Awakening public interest in libraries by concretely demonstrating the benefits of good library service.

It has been apparent throughout this study that many people place too restrictive a view upon interlibrary cooperation. It is often thought of in one or more of these ways

-- an expanded system of interlibrary loans

-- a system for purchasing and handling mechanical processing of acquisitions

-- an electronically connected system between various libraries, operating (in its lowest form) as a locator for materials in the system collectively, or (in its highest form) as a full-blown information retrieval system.

Each of these concepts can and should be envisioned in a system of cooperation. But there is a fourth requirement, often lacking in present thinking -- a system which critically examines the existing roles and utilization of resources in the present spheres of influence, i.e., public, private, academic, government, and special libraries.

Too often, cooperation is viewed as a system or technique which is developed or simply superimposed on the existing system. We feel strongly that in Oregon, with its shortage of resources, that library cooperation must include a reexamination of the basic resources. It may,

for instance, recommend redistribution of resources at the local level, such as combining a school library with a public library branch, which may result in greatly improved resources and service capabilities.

Limitations of, and Barriers to, Interlibrary Cooperation

As noted earlier in this chapter, interlibrary cooperation cannot be looked upon as a panacea for today's inadequate resources. The primary goal of cooperation is to better utilize existing resources and, therefore, to reduce the magnitude of the development task ahead.

The majority of the library resources in the State of Oregon are concentrated in a very few libraries. These large libraries will be called upon to serve by the system more often than they are served. It would be unrealistic, for instance, to expect the University of Oregon Library or the Library Association of Portland to voluntarily participate in a cooperative system with the knowledge that they will be nothing more than "resource centers" for the smaller libraries in the State. A method of compensating larger libraries for their services to small libraries must be developed as a part of the Phase II study.

A number of difficult barriers to achieving interlibrary cooperation exist. They include the following.

Political

A system of interlibrary cooperation by involving schools, State, County, and City governments will cut across traditional jurisdictional boundaries, therby conflicting with the tradition of local government autonomy in the State. Since the cooperative system will demand voluntary participation, it is important that the idea and opinions of each

participating unit in the State be enlisted and included in the cooperative system whenever possible. Direct participation in the planning of the system by as many groups as possible will ensure that the majority of the objectionable features are worked out before the system is implemented.

Economic

The present economic difficulties facing the State are well known at this point. It should be pointed out that any system of cooperation must be within a reasonable economic framework.

There are various sources from which to draw funds for support of a cooperative system, including

-- local government
-- state government
-- federal government
-- philanthropic organizations
-- private individuals
-- private business.

All of these sources must be carefully researched in the Phase II study and alternate means of efficiently utilizing these funds should be presented.

Public Support

The general public places libraries, particularly public libraries, very low on the list of public services they demand and are willing to pay

for. This was borne out repeatedly in the study interviews and by reviewing literature in the library field. In part, the public apathy toward libraries stems from the failure of libraries to adequately define and communicate their role to the public.

A system of interlibrary cooperation is going to benefit Oregon only if the public supports it. It is of no value to establish a system that will provide better library service, if the public is not aware that the service is available. The system of interlibrary cooperation and its benefits must be continually sold to the People of Oregon.

III. STRUCTURING THE PHASE II STUDY

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In proceeding with the Plan for Interlibrary Cooperation in Oregon, there is a need to continue some of what was begun in Phase I. The first phase indicated a dialogue which has been valuable; it has stimulated discussion and assisted in definition of terms. That dialogue must continue and be augmented. There are still few in the State who understand the merits or envision the possibilities of cooperation.

Phase II, however, must necessarily undertake some specifically structured activities. These should include, but not necessarily be restricted to, the following

-- investigation of a system of regional systems

-- investigation of cooperative mechanical functions

-- a better understanding of the needs of the library user

-- inventory and categorization of resources

-- tying together needs and resources, designing mechanics for finished systems, including data processing

-- economic feasibility analysis

-- implementation.

Investigation of a System of Regional Systems -- a Basis for Building

In Oregon today, there are some areas of cooperation, as pointed out earlier, but generally speaking, there is little present framework of cooperation on which to build.

The creation of a framework for cooperation is likely to follow regional lines. In tying libraries together, either a concept of total centralization will be followed, or one of certain decentralization, i.e., regional libraries. Indeed, some of the plans adopted by other states suggest a pattern for Oregon. The establishment of regional systems, supplemented by reference centers, appears to have application for Oregon, and the Phase II study should pursue investigation along these lines. In Oregon today for instance, the Library Association of Portland, the State Library and the University of Oregon Library represent logical points for reference centers. Additional reference centers, one in southern Oregon and the others in eastern Oregon must be examined.

The welding of libraries into regional systems is, of course, a key element of study in Phase II. Some indication of the task can be obtained from the present activity in Medford-Grants Pass-Ashland-Coos Bay. The investigation of optimum combinations is, of course, an important ingredient to Phase II. The task is significantly complicated by the fact that for Oregon, libraries of various types should be welded together, rather than restricting the combination to public libraries alone. Thus, in some areas, such as in eastern Oregon, the key element in the regional system may be the Community College Library, rather than the public library. We continue to feel strongly that Oregon must look to the cooperative effort between all types of libraries, rather than between libraries in today's separated spheres of influence and activity, i.e., public, academic, government, private.

In our oral presentations in Salem, we pointed out one of the significant opportunities for studying cooperation -- the new high school library in Medford which is planning public library service. Here a new facility, built and equipped with funds outside the public library budget,

represents a major potential shift in pattern of service and usage in this community. This experiment needs careful attention in Phase II, and may become an important guideline for service elsewhere in the State.

Cooperative Activity for Mechanical Functions

Interlibrary cooperation is often thought of as merely exchange of materials or information between libraries. An equally important area for investigation in Phase II is the opportunity for cooperative activity in mechanical functions, such as processing of book acquisitions. Essentially, all libraries in the State now perform mechanical functions internally, which while making them self-sufficient, represents a waste of precious funds. Phase II will investigate and recommend areas and techniques for reduction of costs in mechanical activities.

Investigation of Needs

In our earlier report, we outlined the importance of a better understanding of needs before constructing an elaborate system of interrelationships between libraries. That must still be accomplished. There was some apparent misunderstanding, however, that the "needs study" would become virtually the entire activity in Phase II. This was not, and is not, our intent.

We continue to feel that the design of an overall system for cooperation without an understanding of the needs of the patron is to build a system out of touch with reality. Consequently, we still propose the steps indicated in the preliminary report, which are reiterated here.

1. A series of 20 to 30 group dynamics sessions will be conducted in an effort to isolate and define relevant consumer attitudes and opinions toward libraries and library services. The area of the State in which the sessions are held would be chosen on the basis of the relative economic, social and geographic spread of the population, i.e., proportionately more sessions would be conducted in the Willamette Valley than in eastern Oregon simply because of the greater population density in the Valley.

2. The attitudes and opinions expressed during the group dynamics sessions will be used in developing questionnaires for library consumer studies aimed at reaching both the library user and the nonuser. Techniques which have applicability here include both mail questionnaires to selected samples and some individual personal interviewing. The questionnaires used in these studies would be designed in a way that would permit the following such information to be collected from the respondents

   -- social and economic status

   -- geographic location and number of years lived there

   -- family size

   -- level of education

   -- occupation

   -- family income

   -- reasons for using libraries

   -- reasons for not using libraries

   -- frequency of library use

   -- purpose of library use

   -- additional library services desired, if any.

3. In-library surveys would be conducted at 10 to 12 public libraries of varying size and quality throughout the State. These surveys would probably include, but not be limited to

   -- stationing a researcher at the main desk and/or the reference desk of the library to record

      - requests for material and service by type of request
      - requests that cannot be met by the local library
      - the reasons for requesting material and how urgently it is needed

   -- a statistical sampling of nonfiction materials in the library stacks to determine the degree of usage by recording the last date the material was checked out

   -- a survey of a school housed public library, possibly the new Medford High School Library, to determine the extent and pattern of adult versus student usage

   -- a study of materials borrowed from a representative library in the State over a 4 to 6 month period.

4. The library needs of higher education are a distinct and somewhat separate problem. They will be researched by

   -- carefully structured interviews with college librarians to determine the extent of the reference and research needs that they are unable to meet

-- discussions with department heads and deans of colleges and universities to obtain opinions on the present and future library requirements of their curriculums

-- the needs of continuing education programs will be developed by

  - carefully reviewing curriculums and proposed curriculums with program administrators and faculty members

  - polls of students in continuing education classes to determine their library needs. We are also interested in determining whether this group of adults has different needs than the general population, and whether they view the public or the school library as the more logical place to serve their requirements.

The need pattern that is developed from the above studies will be projected into the future by relating it to State forecasts of the following factors

-- age groups

-- population growth by area

-- occupational classification

-- level of education

-- school population.

Resources

It is not realistic to define an approach for determining library resources in the State until there is an adequate understanding of needs. Given the clear understanding of need by the methods outlined above, we will be able to ascertain the optimum combination of resources necessary to meet the needs. It will then be possible to develop the measures necessary to evaluate current resources and compare these with the optimum. It is likely, however, that the following areas will be studied as possibilities for evaluating current resources:

-- regional union catalogs of nonfiction materials

-- a breakdown of public library nonfiction holdings by catalog classification, such as is now available for the elementary and secondary school holdings

-- development of more specific standards for libraries based on needs as developed. These standards would permit each individuual library to evaluate its own resources

-- human resources must be cataloged as well as books. In addition to information on age, professional training and experience, it may be desirable to place some judgment factors into this area for evaluation of performance.

Tying Together Needs and Resources

The basis for investigations recommended here may appear somewhat theoretical, but they in fact are similar to processes which are undertaken in some ways today in the State.

We had a most enlightening discussion after the oral presentation with representatives of the Library Association of Portland regarding the resource and needs areas. The task which we see to be accomplished for the State has significant parallel to the approach used in Portland for branch libraries.

By whatever technique, branches begin to establish "needs" for collections and, as they do so, they acquire materials. The needs are different depending upon the area served and upon the clientele of the particular branch. Over a period of time, "standards" evolve, based upon supply and demand of materials.

The task for the State study is much like this. The techniques need to be more explicit and obviously, the magnitude is far greater. But the basic requirements are much the same.

Problems of the Mechanics of a Finished System

Existing Cooperative Systems

Areas that have operating systems for interlibrary cooperation will be visited and the possible applicability of these systems will be related to the Oregon situation. Possible areas include

-- East Bay - San Francisco, California

-- Central Valley - Fresno, California

-- New York State

-- Michigan.

Data Processing

Ideally, some sophisticated form of information retrieval using advanced computer processing and communication techniques would be utilized in a cooperative system. Such a system conceivably would allow rapid answers to the questions of document availability relating to a particular subject. While these techniques and systems will be studied, several points related to them should be presented for consideration at this time:

1. A statewide union catalog could cost anywhere from $1.00 to $3.00 per unique item cataloged, depending on the degree of sophistication. Such a catalog, if maintained on a computer, could provide information on the status of each document, thus answering the question of availability. However, each status notice, i.e., checkout, return, overdue, would result in a continuing operations cost at from $0.59 to $0.25, again depending upon the level of sophistication.

2. Computer subject searching of the catalog would require both greater input and higher computer cost. Multiple descriptor coincidence such as radar, S-Band, Russia where the individual desires information on Russian S-Band Radars, increases the system cost significantly because of the large number of descriptors necessary for each document and the computer time required to make the search.

3. The cost to operate a basic retrieval system that would provide both status and availability by subject or descriptor retrieval in a cooperative system of the size envisioned for the State of Oregon could cost in excess of $300,000 per year to operate.

We do not wish to judge the desirability of data processing at this point. It is important to point out, however, that such systems can

be extremely expensive to install and operate. We feel that a better understanding of needs as developed in Phase II will help place the desirability of such sophisticated systems in perspective.

Economic Feasibility

The discussion of operating systems, of course, raises the issue of financing a system of interlibrary cooperation. With no system yet envisioned, it is only appropriate to state here that Phase II must deal with the problem in the light of the existing financial climate in the State.

The Phase II study will include a detailed cost analysis of the finished system and a breakdown of the alternative means of financing it. Futhermore, it may be necessary to present variations or alternative systems which will be geared to different levels of cost, and therefore acceptance.

Implementation

The methods for implementing the cooperative system cannot be spelled out until the actual system is developed. However, implementation will surely require a good deal of education and training at the local library level and the following steps will be considered in Phase II to accomplish this:

1. A manual prepared for local libraries detailing the policies and procedures of the system.
2. A test of the system using one area of the State or one group of libraries in an effort to uncover and correct unforeseen problems.

We would expect to work with you in the implementation activity to assure that the planning activity would come to fruition.

Time and Costs for Accomplishment

As we now envision it, Phase II will take nearly a calendar year to accomplish, although some reduction in time can be accomplished by increased staffing at certain points of the study.

A major cost factor for the Phase II activity relates to the needs of higher education. This substudy is of major magnitude for it entails a system designed to serve the highest level of library needs in the State. Yet, to accomplish the overall plan in the State, this major subsystem cannot be ignored, nor should it be accomplished separately at a later date designed essentially to work around the total State system.

The system for the State plan entails costs in the range of $100,000 to $125,000. The higher education system is likely to add $50,000 to $75,000 to that.

We feel that upon the acceptance of Phase I, discussion of various alternatives for continuation should begin. We, of course, would be prepared to submit firm figures for any contractual agreement.

We have enjoyed working with the Library Trustees, the Advisory Council and the staff of the State Library in this assignment. We look forward to the opportunity of continuing that relationship in Phase II.